

## Patterns in Planning

By [Michael D. Short](#) on February 26, 2014

I like patterns. They provide some level of predictability and knowledge of what might come next. We derive a level of comfort from knowing – or at least having a good idea of – what will come next in any process or series of events.

Patterns can also be used to work backwards from an outcome to guess, with a reasonable degree of success, what the process was that led to a particular outcome. We consultants use this little trick to impress prospects when they call with a problem/challenge and we “guess” what happened prior to the result.

Based on recent observations of law firms or practice groups grappling with the new business of law and trying to evolve as quickly as possible, I am seeing a consistent pattern within firms that are concerned with their lack of progress against their plans and are contacting us out of frustration and for assistance.

Here are the typical steps:

1. **A sense that the firm is falling behind its key competitors**, which is followed by...
2. **An aggressive call-to-arms**...we need a bold plan that will be quickly assembled by our most experienced (read “oldest and most change averse”) Partners, who develop...
3. **An over-aggressive, over-reaching plan** that has as its only goal “more new business”. Furthermore, this goal will be achieved based on either a) old tactics or b) the premise of working harder, “because we’re very smart and we will figure it out as we move along”, which begets...
4. **Frustrations**, from the senior partners who feel like they are doing all the work and from the junior partners who feel ignored in the process, which results in...
5. **Apathy**, with all Partners going back to what they are most comfortable with, which creates...
6. **Runaway inertia**...at a time when inertia is an extremely dangerous characteristic, which further creates...
7. **A lack of confidence in further planning**, because past results are viewed as a definitive driver of future outcomes.

At a time of winners and losers (of market share), this pattern is unacceptable but it is playing over and over like a tired sitcom in syndication. Also like a sitcom in re-runs, we’re tired of seeing it over and over.

To keep your planning efforts on a more fruitful track, I offer a much better pattern to follow. This one is more realistic and elegantly simple in its goals, achievable in its implementation, and is designed to build momentum and confidence in the process:

1. **A recognition that the business of law is changing**, which presents an opportunity to be proactive while the firm is doing well, which is followed by...
2. **An assembly of the firm’s true strategic thinkers**, regardless of seniority or standing within the firm, who develop...
3. **An achievable plan** that has only 2-3 supporting initiatives needed for success (e.g., client succession, merit-based professional development, cementing existing clients to the firm), each of which is supported by a detailed staffing plan, timeline, and metrics for tracking progress, which begets...
4. **Confidence**, because progress is demonstrable from the plan and the metrics AND successes are publicized within the firm by regular updates from management to keep the organization focused, which results in...

5. **Momentum**, as even the initial skeptics who started as bystanders sense that this time something is different and they should get involved before the project gets too advanced, which creates...
6. **Receptivity to more aggressive changes and innovation**...at a time when the ability to innovate is a strategic differentiator in the marketplace, which further creates...
7. **Absolute confidence in further planning**, because past results are viewed as a definitive driver of future outcomes.

Learn from others' mis-steps and have the guts to act when you are in control of your destiny...not when your control over your destiny is challenged. Patterns will provide some level of predictability and knowledge of what might come next. While no outcome is guaranteed, following the right pattern increases your odds of success significantly.